# PES
# PERFORMANCE EVALUATION SYSTEM BRIEF

MMOA-4
Maj Cederholm

# Background

- Established in 1999 to:
  - Stop inflation
  - Stop rank ordering
- Executive Offsite Decision
  - To retain current PES without modifications
  - Educate Marines on the Performance Evaluation System (PES)

# Outline

- Overview
- Reporting Senior Issues
- Reviewing Officer Issues
- Additional Issues and Information

# PES Objectives

- Accurate reporting
  - Assigned duties
  - During a designated period
  - Based on Marine Corps standards
- Preventing inflation
- Providing information for selection boards
- Honest, consistent reporting is the key

# Master Brief Sheet (MBS)

| NAME | SSN | GRADE | RANK DESCRIPTION | DOR | COMP | LINEAL NO | PMOS | AMOS-AMOS | GT/GCT | PERM GR | PERM DOR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| MARINE IAM A. | 123456789 | O4 | MAJ | 19990501 | USMC | 05060000 | 0302 | 9957 / | 119 | O4 | 19990501 |

| DOB | DEAF | PEBD | AFADBD | AC NAV BD | ACC 1ST COMM | DOR 1ST COMM | DOR 1ST LDO | DSG PILOT | DCADB | EAS | DCTB | OSCD | CONTRACT LEGAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 19640114 | 19880823 | 19880823 | 19890206 | | 19890414 | 19890414 | | | 19880613 | | 20010613 | 19940714 | NONE. ALL RE |

| DECORATIONS | | MILITARY EDUCATION | | | | CIVILIAN EDUCATION | LANGUAGES |
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| | | SUMMER MOUNTAIN LEADER | 1996 | | | | |

SPL INFO: A C0 HQ BN HQMC SCTY: S/2/19900412 JT-MOS: Date: 11/18/2002 — PAGE 1 OF 1

| MONITORED COMMAND ORGANIZATION/SCHOOL REPORTING SENIOR | DUTY ASSIGNMENT GRADE TYPE DUTY BILMOS REVIEWING OFFICER | OCC | BEGIN END DATE | MISSION PER | MISSION PRO | CHARACTER COU | CHARACTER EFF | CHARACTER INI | LEADERSHIP LEA | LEADERSHIP DEV | LEADERSHIP SET | LEADERSHIP ENS | LEADERSHIP COM | INTELLECT PME | INTELLECT DEC | INTELLECT JUD | EVAL RESP | PROMOTION Y | PROMOTION N | PROMOTION NA | PROMOTION ACC | REPORT SUMMARY COM | REPORT SUMMARY ADV | #RPTS @PROC | REL VAL @ PROC | #RPTS CUM | REL VAL CUM | RO CONCURS Y | RO CONCURS N |
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| 1 | RIFLE COMPANY COMMANDER | GC | 19980801 | E | E | E | E | E | E | D | E | D | E | E | E | E | E | | | X | | X | | 9 | 91.95 | 11 | 90.68 | X | |
| COMPANY I, 3D BATTALION, | CAPT N 0302 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LTCOL JOHNSON | | | 19990431 | | | | | | | | | | | | | | | | | | | FitRep Avg: 4.86 | | RS Cum Avg: 4.78 | | RS High: 5.86 | | | |
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| 2 | BATTALION OPERATIONS OFFIC | CH | 19990501 | C | D | D | D | D | D | D | D | C | D | B | D | D | C | X | | | | | | 7 | 83.59 | 7 | 83.59 | X | |
| 3RDBN 2NDMAR 3RDMARDIV | MAJ N 0302 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| 3 | BATTALION OPERATIONS OFFIC | TR | 19990827 | C | B | C | C | B | B | B | C | C | B | B | C | C | C | X | | | | | | 3 | 93.92 | 5 | 94.44 | X | |
| 3RDBN 2NDMAR 3RDMARDIV | MAJ N 0302 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LTCOL MORGAN | | | 20000702 | | | | | | | | | | | | | | | | | | | FitRep Avg: 2.57 | | RS Cum Avg: 2.46 | | RS High: 2.71 | | | |
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| 4 | STUDENT | TR | 20000701 | D | D | H | H | H | H | H | H | H | H | H | H | H | H | X | | | | | | | N/A | | N/A | | |
| COLLEGE OF NAVAL COMMA | MAJ A NA | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| COL STEIN | | | 20010615 | | | | | | | | | | | | | | | | | | | FitRep Avg: | | RS Cum Avg: 4 | | RS High: 4 | | | |
| | RDMU ALLEN | | | RO: 0/1 | | 0/2 | | | 0/3 | | 2/4 | | 3/5 | | 2/6 | | 1/7 | | 0/8 | | | | | | | | | | |
| 5 | CURRENT OPERATIONS | AN | 20010616 | E | D | E | D | E | D | C | D | D | D | E | D | D | H | X | | | | | | 1 | N/A | 4 | 85.51 | X | |
| HQSVC CO HQBN ARLINGTO | MAJ N 0302 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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# Outline

- Overview
- Reporting Senior Issues
- Reviewing Officer Issues
- Additional Issues and Information

# Relative Value

A numerical representation of how the average of a single fitness report compares to the average of all reports written by an RS on Marines of the same grade

# Relative Value

- Assists in evaluating the RS's marking philosophy
- Quantitative analysis of performance in relation to peers
- Only one of many items on the report

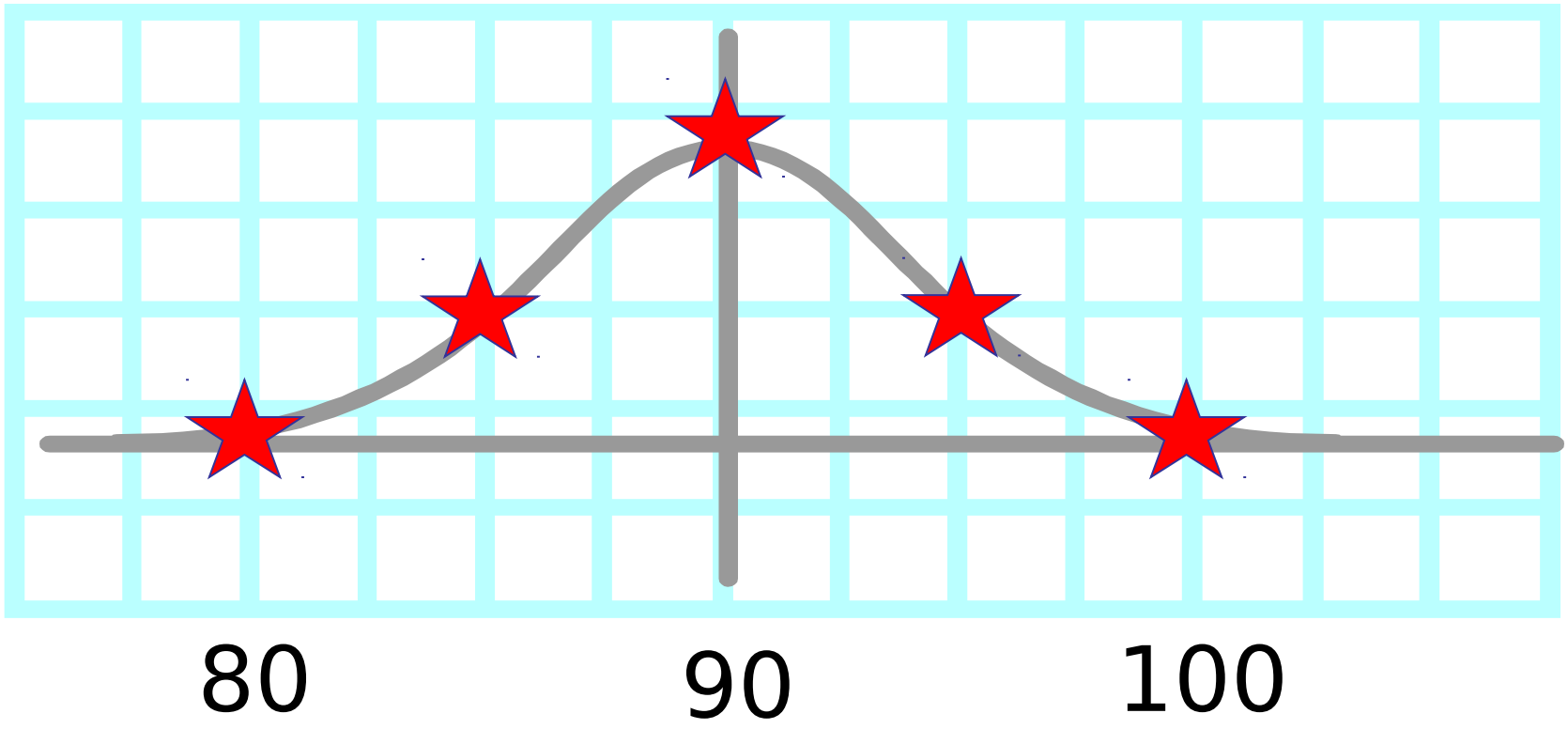
# Calculating the FitRep Average

| PER | PRO | COU | EFF | INI | LEA | DEV | SET | ENS | COM | PME | DEC | JUD | EVAL RESP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| E | D | C | C | C | D | C | C | D | C | B | C | C | H |

| PER | PRO | COU | EFF | INI | LEA | DEV | SET | ENS | COM | PME | DEC | JUD | EVAL RESP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 5 | 4 | 3 | 3 | 3 | 4 | 3 | 3 | 4 | 3 | 2 | 3 | 3 | 0 |

**Add the marks - 43**
**Divide by # of observed marks - 43/13 = 3.31**
**FitRep Avg = 3.31**

# Relative Value



# Relative Value on the MBS

| #RPTS @PROC | REL VAL @ PROC | #RPTS CUM | REL VAL CUM | RO CONCURS | |
|---|---|---|---|---|---|
| | | | | Y | N |
| **8** | **90.49** | **10** | **89.91** | X | |

FitRep Avg: 4.67

RS Cum Avg: 4.67

RS High: 5.36

# Relative Value on the MBS

| #RPTS @PROC | REL VAL @ PROC | #RPTS CUM | REL VAL CUM | RO CONCURS | |
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**FitRep**
**Avg: 4.67**
**High: 5.36**

**RS Cum**
**Avg: 4.67**

**RS**

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SPL INFO: A C0 HQ BN HQMC; SCTY: S/2/19900412; JT-MOS: ; Date: 11/18/2002

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| COMPANY I, 3D BATTALION, | CAPT N 0302 | | 19990431 | | | | | | | | | | | | | | | | | | | FitRep Avg: 4.86 | | RS Cum Avg: 4.78 | | RS High: 5.86 | | | |
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| 4 | STUDENT | TR | 20000701 | D | D | H | H | H | H | H | H | H | H | H | H | H | H | X | | | | | | N/A | | N/A | | |
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| | RDMU ALLEN | | | RO: 0/1 | | 0/2 | | 0/3 | | 2/4 | | 3/5 | | 2/6 | | 1/7 | | 0/8 | | | | | | | | | | | |
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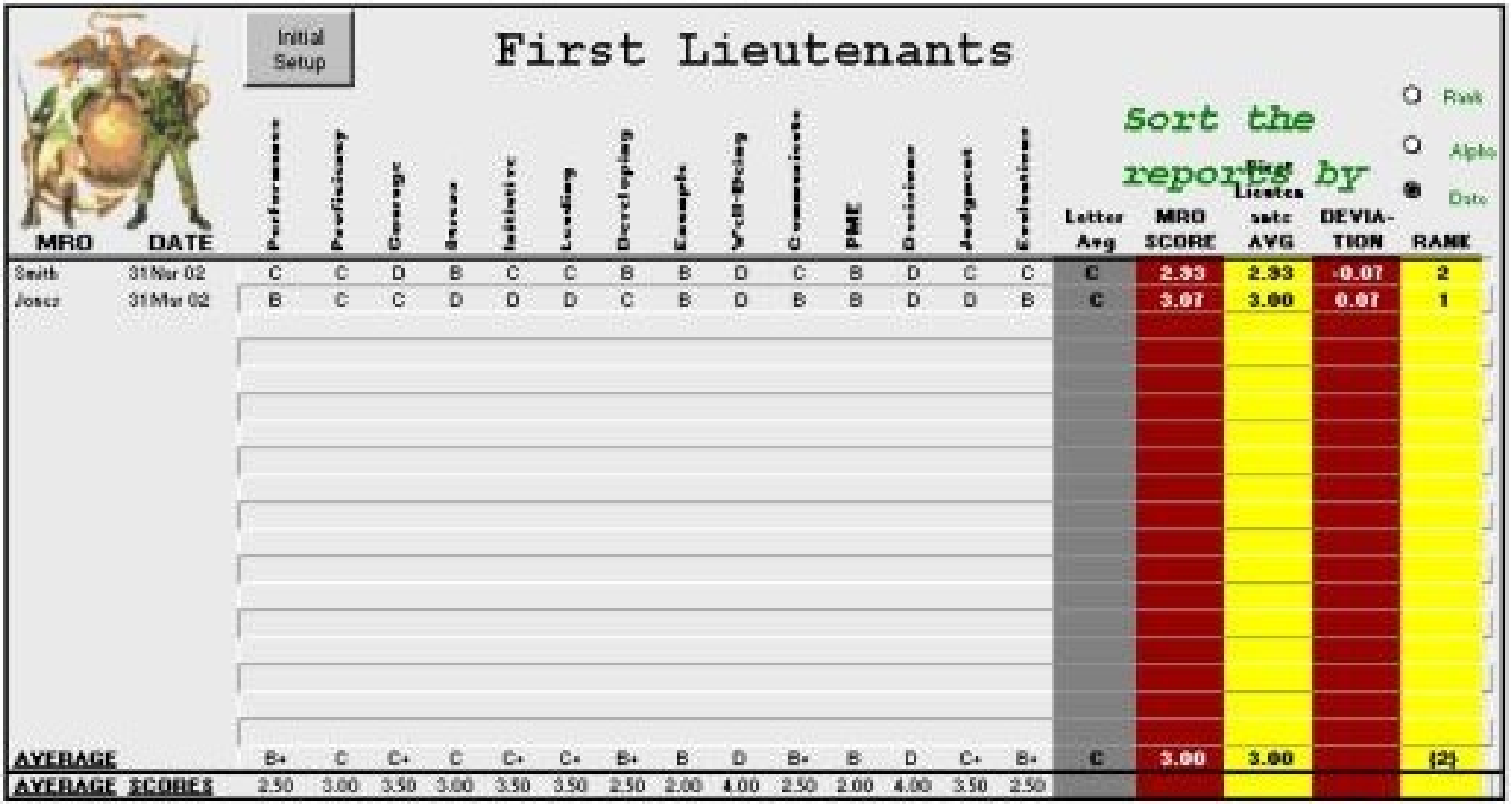
| | BGEN TURNER | | | RO: 0/1 | | 0/2 | | 0/3 | | 7/4 | | 19/5 | | 12/6 | | 0/7 | | 0/8 | | | | | | | | | | | |

# Items to be Aware of

- Low numbers of reports for a grade
- Multiple reports on one MRO
- Short reporting periods
- Occasions that do not result in an RV
  - Not Observed, Extended, Academic, End of Service
- Beginning a new rank
  - Separate profile for each rank
  - Be consistent
  - Use the scale – do not mark everyone the same

# Tracking FitRep Averages

- When you are done writing the report...



# Final RS Issues

- Consistent reporting is the key
- Half the reports you write will be below average
- If you mark a report higher to help a Marine you are really hurting all the other Marines you have written on
- A Sgt report is as important as any other report

# Outline

- Overview
- Reporting Senior Issues
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# Reviewing Officer "Snapshot"

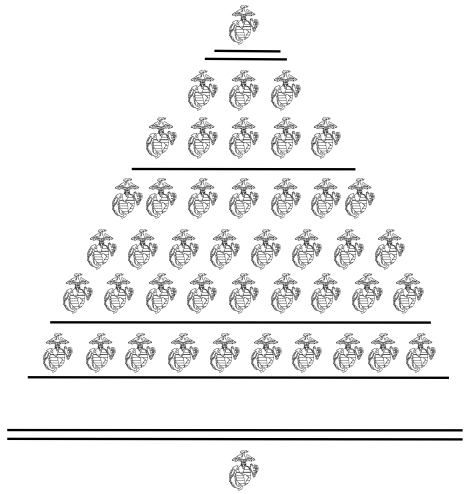
## K. REVIEWING OFFICER COMMENTS

**1. OBSERVATION:** ☒ Sufficient ☐ Insufficient

**2. EVALUATION:** ☒ Concur ☐ Do Not Concur

**3. COMPARATIVE ASSESSMENT:** Provide a comparative assessement of potential by placing an "X" in the appropriate box. In marking the comparison, consider all Marines of this grade whose professional abilities are known to you personnally.

| DESCRIPTION | | COMPARATIVE EVALUATION |
|---|---|---|
| THE EMINENTLY QUALIFIED MARINE | ☐ | 0 |
| ONE OF THE FEW | ☐ | 2 |
| EXCEPTIONALLY QUALIFIED MARINES | ☐ | 7 |
| ONE OF THE MANY HIGHLY QUALIFIED | ☒ | 10 |
| PROFESSIONALS WHO FORM THE | ☐ | 10 |
| MAJORITY OF THIS GRADE | ☐ | 4 |
| A QUALIFIED MARINE | ☐ | 1 |
| UNSATISFACTORY | ☐ | 0 |



**4. REVIEWING OFFICER COMMENTS:** Amplify your comparative assessment mark; evaluate potential for continued professional development t include: promotion, command, assignment, resident PME, and retention; and put Reporting Senior marks and comments in perspective.

# RO distribution on the MBS

| PER | PRO | COU | EFF | INI | LEA | DEV | SET | ENS | COM | PME | DEC | JUD | EVAL RESP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| E | D | C | C | C | D | C | C | D | C | B | C | C | H |
| | | | | | | | | | | | | | |
| **RO:** 0/8 | | 0/1 | 1/2 | | 4/3 | | 10/4 | | 11/5 | | 7/6 | | 2/7 |

## K. REVIEWING OFFICER COMMENTS

**1. OBSERVATION:** ☒ Sufficient ☐ Insufficient

**2. EVALUATION:** ☒ Concur ☐ Do Not Concur

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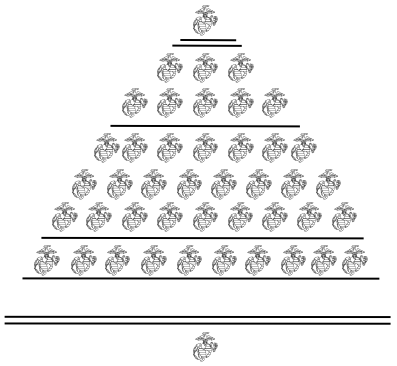
| DESCRIPTION | | COMPARATIVE EVALUATION |
|---|---|---|
| THE EMINENTLY QUALIFIED MARINE | ☐ | **(8)** 0 |
| ONE OF THE FEW EXCEPTIONALLY QUALIFIED MARINES | ☐ | **(7)** 2 |
| | ☐ | **(6)** 7 |
| ONE OF THE MANY HIGHLY QUALIFIED PROFESSIONALS WHO FORM THE MAJORITY OF THIS GRADE | ☒ | **(5)** 10 |
| | ☐ | **(4)** 10 |
| | ☐ | **(3)** 4 |
| A QUALIFIED MARINE | ☐ | **(2)** 1 |
| UNSATISFACTORY | ☐ | **(1)** 0 |



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| HQSVC CO HQBN ARLINGTO | MAJ N 0302 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| COL WRIGHT | | | 20020630 | | | | | | | | | | | | | | | | | | | FitRep Avg: 4.23 | | RS Cum Avg: 4.52 | | RS High: 5.15 | | | |
| | BGEN TURNER | | | RO: 0/1 | | 0/2 | | | 0/3 | | 7/4 | | 19/5 | | 12/6 | | 0/7 | | 0/8 | | | | | | | | | | |

# Final RO Issues

- ROs must provide the experienced leadership and perspective
- ROs are responsible for supervising and enforcing the reporting standards
- Don’t force a RS to “break” their profiles
- Accurately evaluate RSs on their own evaluation responsibilities
- Ensure the Senior Enlisted are involved and providing input to the process

# Outline

- Overview
- Reporting Senior Issues
- Reviewing Officer Issues
- Additional Issues and Information

# Comments

- Directed Comments
- Inappropriate comments
- Justification of marks
- What you wouldn’t know without detailed observation during this period
- Performance and Potential
- Appropriate recommendations
- Comparison to peers

# How Boards View the PES

- All elements of the report combine to paint a picture of that period
- A careers worth of reports paints a picture of the Marine
  - It is rare for a single report to make or break a record

# Adverse Reports

- PES Order chapter 5 defines
- Below average RV does not make report adverse
- RO can make report adverse
- Third officer sighting
- Use common sense
  - Many reports get pulled by PERB because they should have been processed as adverse

# MRO Counseling

- Report is not a counseling tool
- MRO worksheet is a requirement
  - Set the standard
- Write meaningful billet accomplishments
- Provide the MRO a copy

# Timely and Accurate Reports

- Occasions are designed to support boards
- Avoid not observed reports if possible
- Check for accuracy
  - SSNs
  - Signatures
- Order compliance

# Automation

- Contract is in place
- Currently being worked
- Will include MRO Worksheet
- MCTFS input
- Expect to see automation in 2004

# Ordering Profiles / OMPFs

- Appendix H of PES has a request form
- Order by:
  - E-mail (preferred)
    - mmsbompf@manpower.usmc.mil
  - Fax
    - DSN 278-5792
  - Mail
    - Commandant of the Marine Corps
      Headquarters, U.S. Marine Corps (MMSB-30)
      2008 Elliot Road
      Quantico, VA  22134-5030

# Assistance

- MMSB-30
  - https://www.mmsb.usmc.mil
  - DSN 278-3995
- Officer Counseling
  - USMC website – Career; Marines; Counseling; Officer
  - 1-800-634-7988
- Enlisted Counseling
  - USMC website – Career; Marines; Counseling; Enlisted
  - 1-800-833-2320
- Performance Evaluation Review Branch (MMER)
  - DSN 278-9204/9205

# Taking Care of your Marines

- Ensure records are accurate, complete and readable
  - MBS and OMPF
  - Enlisted Marine’s records are the responsibility of the commander
- Photo
- PME Complete

# Bottom Line

- Honesty and consistency are the key
- Use the MRO Worksheet
- Mark with your heart, but use your head
  - Read the attribute descriptions and mark appropriately
  - Track your marks to prevent changes over time
  - Do not change your marking philosophy
- ROs must ensure reports are consistent, accurate and unbiased evaluations

# Questions ?